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Wealthtech Weekly

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By Rob Burgess
Reporter

These days, social media can feel less like a fun way to stay in touch and more like "putting evidence in the evidence machine," as writer Dan Sheehan said.

After Charlie Kirk's killing, many employees found out the hard way that their posts reflect on their employers. Experts said these recent incidents highlight the need for firms to have clear, written social media policies.

Does your firm have one? Let me know — robert.burgess@arizent.com.

I hope you'll check out this article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

PRACTICE AND CLIENT MANAGEMENT

Strong social media policies shield wealth firms from potential fallout

After right-wing activist Charlie Kirk was killed, some workers found out the hard way that personal social posts had professional consequences. Experts say the time for firms to strengthen policies is now.

- **From LinkedIn to Reddit, the social media strategies that work for advisors**
  LinkedIn still rules for professionals, and newer platforms like Bluesky are on the rise. But is social media even worth the effort for advisors these days?

- **How advisors can scale their firms with talent, organization, empathy**
  Several panels and presentations last week at Future Proof focused on the idea of advisors growing their businesses through offering specialized, family office-style services.
- **AI takes the spotlight as 7 fintechs pitch their products to advisors**
  Agentic AI in several forms took center stage as fintech executives made the case for their services at the first-ever AI-focused demo drop at Future Proof.
- **How RIAs can prevent serious AI fails, reduce regulatory risk**
  As AI use expands in wealth management, so too does regulatory risk. Experts at Future Proof shared what questions RIAs should ask vendors, along with tips on implementing firm-wide AI guardrails.

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Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

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